

Preparing for travel

- Utilize the Caltech Travel site
 - <http://procurement.caltech.edu/departments/cardquest/travel/traveling1>

Caltech Procurement Services

Departments/Resources **Training** **For Our Suppliers** **Contracted Suppliers** **P2P** **Events** **Announcements**

- Travel** | P-Card | Reference Guides | CardQuest FAQ's | What is CardQuest | CardQuest Benefits | Contact Us | Expenselt | Training
- Fly America Act | **Travelling** | Agreements | Booking Fees | Travel Forms | Policies & Procedures | CTP Contact | Resources | FAQ's |
- Group Travel | Caltech Travel Fair | Personal Travel
- Health | Safety & Communication | Identification | Travel Expenses | When You Return | Bagagge, Equipment & What to Pack

Traveling

Travel Planning

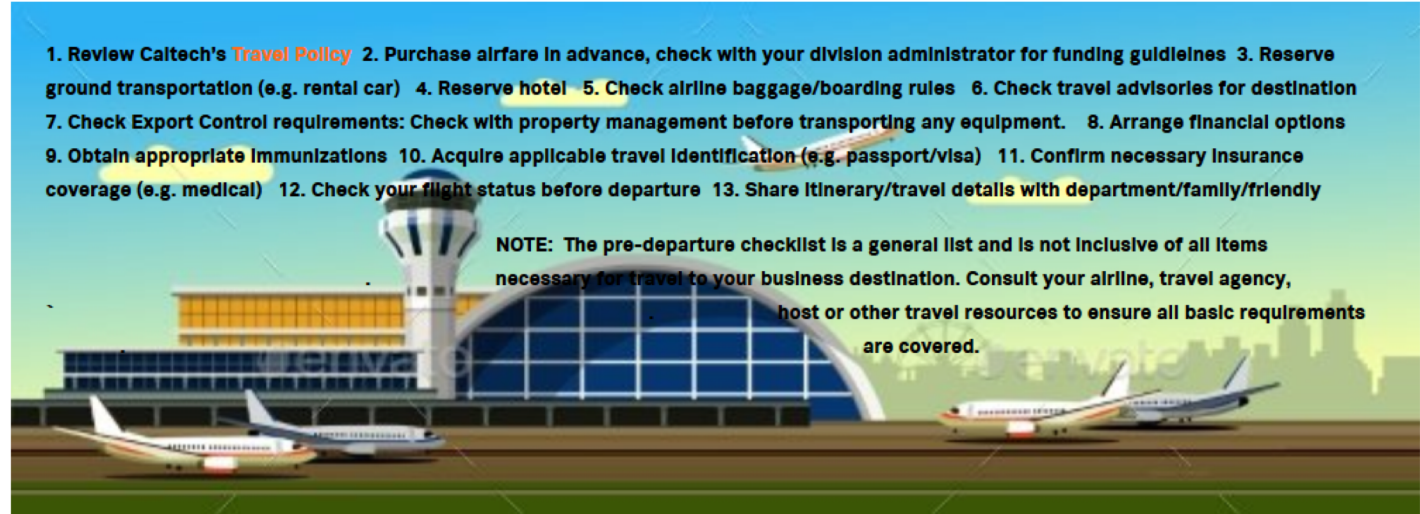
University business travel requires considerable planning to ensure the best experience during the trip and after when reconciling expenses. Be sure to check with your department to determine the requirements necessary to initiate your travel arrangements (e.g. specific approval requirements, university procurement options, etc.).

Dependent upon your department, you may be required to compile a list of expenses and their estimated costs.

Travel Policy

To ensure efficiency and fiscal responsibility, be sure to refer to Caltech's [Travel Policy](#) prior to departure and before extending institute/personal funds for travel related expenses.

Pre-Departure Checklist



1. Review Caltech's [Travel Policy](#) **2. Purchase airfare in advance, check with your division administrator for funding guidelines** **3. Reserve ground transportation (e.g. rental car)** **4. Reserve hotel** **5. Check airline baggage/boarding rules** **6. Check travel advisories for destination** **7. Check Export Control requirements: Check with property management before transporting any equipment.** **8. Arrange financial options** **9. Obtain appropriate immunizations** **10. Acquire applicable travel identification (e.g. passport/visa)** **11. Confirm necessary insurance coverage (e.g. medical)** **12. Check your flight status before departure** **13. Share itinerary/travel details with department/family/friendly**

NOTE: The pre-departure checklist is a general list and is not inclusive of all items necessary for travel to your business destination. Consult your airline, travel agency, host or other travel resources to ensure all basic requirements are covered.



What To Take With You



Identification

REAL ID act
[Read more...](#)



Safety, Emergency Contact list and Communication

[Read more...](#)



Baggage, Equipment & What to Pack?

[Read more...](#)



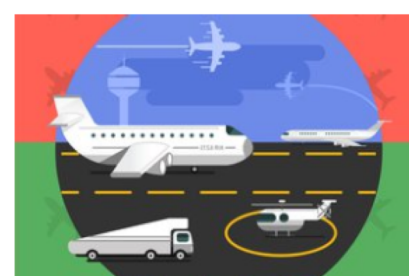
Travel Expenses, Money & Financial Resources

Bring multiple forms of money, including traveler's checks, ATM cards, credit cards, and cash. Do not rely on a single means of accessing funds.
[Read more...](#)



Health & Medical Insurance Card

Carry your insurance card and important medical information about any significant health issues in the event of an emergency.
[Read more...](#)



When you return home

[Read more...](#)

Need some assistance booking your travel? Call Corporate Travel Planner's Full Service Agent Assist and speak to our knowledgeable Travel Consultants.

(844) 688.7601 (toll free)

M-F | 8am-5pm PST

Need Online Assistance? We Can Help.

(877)727.5188 (toll free)

M-F | 8am-5pm PST

For More Information Contact Travel Services at TravelStaff@caltech.edu

Caltech

Foreign travel

- Check the U.S. State Dept. site for passport info and travel advisories.
 - travel.state.gov



Travel.State.Gov

U.S. DEPARTMENT OF STATE — BUREAU OF CONSULAR AFFAIRS

U.S. Passports

International Travel

U.S. Visas

Intercountry
Adoption

International
Parental Child
Abduction



Find International Travel Information



Get a U.S. Passport



Get U.S. Visas



Learn About Adopting a Child to and from the U.S.



Protect a Child from Parental Abduction to or from the U.S.

Foreign travel

- Utilize (fee services) for passport/visas
 - CTP has an in-house person.
 - Omega Passport Services
331 N. Brand Blvd, Glendale, CA 91203
Call (818) 545-0000 and ask for “Jill.”
 - Mania’s Passport & Visa Services:
maniaspassportandvisa.com
 - VisaHQ: visahq.com
- EAS Division confirms we can pay for fee services on faculty discretionary funds.

Air and Rail Travel Fare/Class Restrictions

		Economy/Coach	Coach Plus	Business Class	First Class
Domestic Travel	Federal Grants	Allowed	Allowed only with prior approval	Allowed only with prior approval	Highly Discouraged Allowed only with prior approval
	Discretionary	Allowed	Allowed	Allowed only with approval	Highly Discouraged Allowed only with approval
Foreign Travel	Federal Grants	Allowed	Allowed only with prior approval	Allowed only with prior approval	Highly Discouraged Allowed only with prior approval
	Discretionary	Allowed	Allowed	Allowed	Highly Discouraged Allowed only with approval

Exceptions

- Upgrades above Coach/Economy are allowed only if: coach would require circuitous routing; coach would require travel during unreasonable hours; coach would excessively prolong travel, coach would result in increased cost that would offset transportation savings; coach is not reasonably adequate for the physical or medical needs of the traveler; coach is not reasonably available to meet mission requirements.

When approval is required, the justification must be appropriately and properly documented. Approval will hinge on meeting at least one of the exceptions described above. Send (via email) requests for approval with backup documentation to the EAS Division Administrator for consideration by the EAS Chair. Note that *prior* approval is required in some cases.

Some awards (federal and non-federal) strictly prohibit business and first class travel. This requirement supersedes Caltech's policy.

Tools & tips to make documentation and receipts easier

So you need documentation

- Upgrades
- Personal Travel
- Traveling with Family
- Other

Take some screenshots

- Train personnel to take screenshots at the time of purchase.
- Show what the fare would have been if they had just traveled for the days of the conference at the allowed fare level.

Print Screen (or PrtScn)

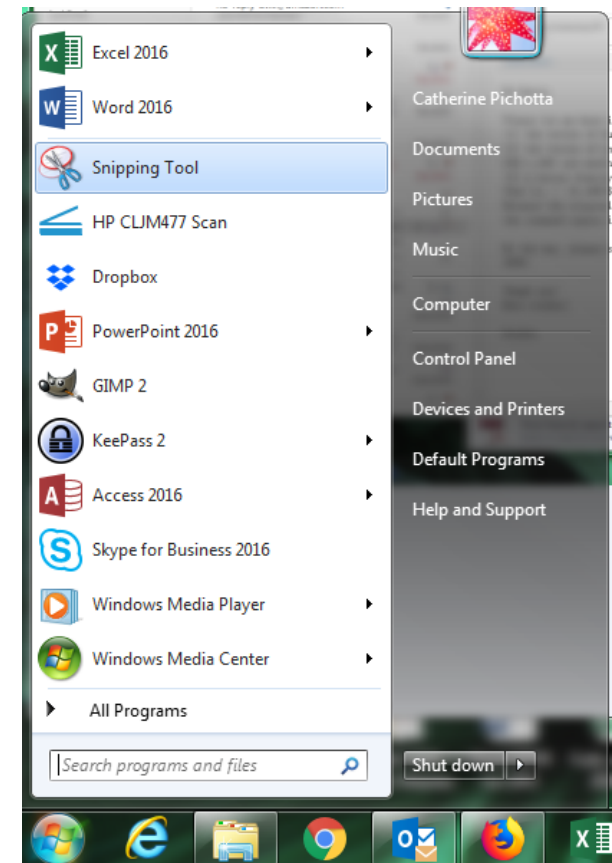
- This copies your entire screen (or screens) to the clipboard.
- You can paste it into Word, crop the image, and save as a PDF.
- Pro: You can show open menus or other information that requires you to click or hover.
- Con: Shows your *entire* screen. You will need to crop the image unless...
 - Copy screenshot of single window:
Alt + PrtScn

Save via Print Screen

- Windows now allows you to save screenshots as images instead of just copying them.
 - Save full screen screenshot:
Windows Key + PrtScn
 - Save screenshot of single window:
Windows Key + Alt + PrtScn
 - These will appear in *Pictures > Screenshots* folder.
- Dropbox likewise allows you to save screenshots.
 - **PrtScn** (full screen) or **Alt + PrtScn** (single window)
 - Instructions for Windows and Mac at:
dropbox.com/help/photos-videos/screenshots
- You may need photo editing software (like Photoshop or Gimp) to crop it.

Snipping Tool

- This tool copies only the portion of the screen you want it to.
- In the current version of Windows (not 7), there are special features like a timed delay and annotation.
- support.microsoft.com/en-us/help/13776/windows-use-snipping-tool-to-capture-screenshots



Firefox

- If you use Firefox, there is a built-in screenshot feature that is similar to the Snipping Tool but a little easier.



STRIKING DESIGN WITH HIGH-POWERED MOBILE PERFORMANCE

\$789

Vostro 14 5000
8th Generation Intel® Core™ i5 Processor, Windows® 10 Pro, 8GB Memory

SMALL BUSINESS Shop Now

- ★ Edit This Bookmark
- ✓ Save Page to Pocket
- 🔗 Copy Link
- ✉ Email Link...
- 📱 Send Tab to Device
- 🖼 Take a Screenshot

Currency Converter

Currency Converter | Historical Exchange Rates | Live Exchange Rates | Transfer Money | [Print](#)

Currency I Have: Chinese Yuan Renminbi (CNY)

Currency I Want: US Dollar (USD)

AMOUNT: 8,000 (I have this much to exchange) ↔ AMOUNT: 1,155.67 (I want to buy something at this price)

Want to transfer money? [Try our Money Transfer service](#) INTERBANK +/- 0% DATE: Oct 15, 2018 [HELP](#)

Personal Money Transfer SEND MONEY WITH TRANSFERWISE	Corporate FX Payments REQUEST A QUOTE	Automated Rates API LEARN MORE	Historical Currency Converter VIEW HISTORICAL DATA
--	---	--	--

Rate Details | [Traveler's Cheatsheet](#)

CNY/USD Details

CNY/USD for the 24-hour period ending **Sunday, Oct 14, 2018 22:00 UTC** @ +/- 0%

Selling 8,000.00 CNY → **you get 1,155.67 USD**

Buying 8,000.00 CNY → **you pay 1,156.52 USD**

TRY ALSO...

- [Mobile Currency Apps](#)
- [Exchange Rate Feed/API](#)
- [Embeddable Converter Widget](#)
- [Money Transfer](#)
- [Corporate FX Payments](#)

- [Forex Trading](#)
- [CFD Trading](#)
- [Bond Trading](#)
- [Indices Trading](#)
- [Precious Metal Trading](#)

Industry's fastest current loop:

Less than 1 microsecond: From sample to PWM

- Triple the motor torque response
- Zero need for an FPGA
- Available in controlSUITE™

Your capital is at risk. Losses can exceed investment. Leverage trading is high risk and not for everyone.

Home | Caltech access.caltech Home Expense Center Currency Converter | Foreign E

https://www.oanda.com/currency/converter/

EN SIGN IN OPEN AN ACCOUNT

OANDA

TRADING CURRENCY CONVERTER MONEY TRANSFER SOLUTIONS FOR BUSINESS RESOURCES

Home > Currency Tools > Currency Converter

STRIKING DESIGN WITH HIGH-POWERED MOBILE PERFORMANCE

DELL SMALL BUSINESS Shop Now

Vostro 14 5000 8th Generation Intel® Core™ i5 Processor, Windows® 10 Pro, 8GB Memory

\$789

Currency Converter

Currency Converter Historical Exchange Rates Live Exchange Rates Transfer Money [print](#)

Currency I Have: Chinese Yuan Renminbi CNY

Currency I Want: US Dollar USD

AMOUNT: I have this much to exchange **8,000**

AMOUNT: I want to buy something at this price **1,155.67**

Want to transfer money? [Try our Money Transfer service](#) INTERBANK +/- 0% DATE: Oct 15, 2018 [HELP](#)

Personal Money Transfer Corporate FX Payments Automated Rate API [Save](#)

SEND MONEY WITH TRANSFERWISE REQUEST A QUOTE LEARN MORE VIEW HISTORICAL DATA

TRY ALSO...

- Mobile Currency Apps
- Exchange Rate Feed/API
- Embeddable Converter Widget
- Money Transfer
- Corporate FX Payments
- Forex Trading
- CFD Trading
- Bond Trading
- Indices Trading
- Precious Metal Trading

Industry's fastest current loop:

Less than 1 microsecond: From sample to PWM

- Triple the motor torque response
- Zero need for an FPGA
- Available in controlSUITE™

Rate Details Traveler's Cheatsheet

CNY/USD Details

CNY/USD for the 24-hour period ending Sunday, Oct 14, 2018 22:00 UTC @ +/- 0%

Selling 8,000.00 CNY → you get 1,155.67 USD

Buying 8,000.00 CNY → you pay 1,156.52 USD

Your capital is at risk. Losses can exceed investment. Leverage trading is high risk and not for everyone.



More resources

- zapier.com/blog/best-screen-capture-tool/

Verify your email address

- This allows you to forward receipts directly into CardQuest.
- If there is an attachment, CardQuest will ignore the email and make the attachment a receipt.
- If there isn't a receipt, CardQuest will turn the email itself into a receipt.
- Just forward to receipts@concur.com.

Save

Email Addresses Go to top

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

+ Add an email address

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	pichotta@caltech.edu	✓ Verified	Disable Verification	Yes	
Email 2	@yahoo.com	✓ Verified	Disable Verification	No	
Email 3	@gmail.com	✉ Check email for code	Resend Cancel	No	

Enter Code OK



Verify your professors' email addresses

- If you have access to their profiles in CardQuest, you can generate the verification codes. You will just need them to forward the verification code to you.
- Once their email is verified, you can forward receipts on their behalf.
- Just forward to receipts@concur.com and change the subject line to their email address.

Quick Steps

- In Microsoft Outlook, use Quick Steps to avoid retyping the email addresses.
- Find Quick Steps on the Home tab. Go to Manage Quick Steps > New > Custom.
 - Name the Quick Step.
 - Select Action: Forward.
 - Enter receipts@concur.com in the To: field and click “Show Options.”
 - Change the Subject: field to the verified email address of the Concur profile where you want the receipt to appear.

Inbox - pichotta@caltech.edu - Outlook

File Home Send / Receive Folder View Adobe PDF Tell me what you want to do...

New Email Items New Ignore Clean Up Delete Reply Reply All Forward Meeting IM More Fwd Concur Fultz group To Profs Concur Wang Gao group Done Concur Gao Reply screening Concur Fultz Card Pick-up Move Rules OneNote Assign Unread/Read Policy

Quick Steps

Edit Quick Step

Name: Concur example

Add actions below that will be performed when this quick step is clicked on.

Actions

Forward

To... receipts@concur.com

hide Option

Subject: pichotta@caltech.edu

Flag: No Flag

Importance: No Change

Text:

Automatically send after 1 minute delay.

Add Action

Optional

Shortcut key: Choose a shortcut

Tooltip text: This text will show up when the mouse hovers over the quick step.

Finish Cancel

Manage Quick Steps

Quick step:

- Fwd Concur
- Concur Wang
- Concur Gao
- Concur Fultz
- Fultz group
- Gao group
- Reply screening
- Card Pick-up
- To Profs
- Done

Description:

Fwd Concur

Actions: Forward

Shortcut key: None

Tooltip: None

Edit Duplicate Delete

New

Reset to Defaults OK Cancel



Sign up for e-receipts

- More and more companies (airlines, hotels, etc.) provide electronic receipts that automatically appear in CardQuest.

+ New Expense

Exceptions

Expense Type	Date
N/A	
Airfare	10/
Lodging	11/

Expenses

Date

Adding New Expense

<input type="checkbox"/>	11/01/2018	!	!	!
<input type="checkbox"/>	10/30/2018	=		
<input type="checkbox"/>	10/17/2018	!	!	!
<input type="checkbox"/>	10/16/2018	!	!	!

Has Electronic Receipt



American Airlines
 4333 Amon Carter Boulevard
 Fort Worth TX US 76155
 http://www.aa.com
 1-800-433-7300

\$

Visa -
 10/16/2018
 Tax Invoice
 Tax ID:
 Receipt:

Passenger Name:

Depart ✈ 10/31/2018 5:00 PM

LAX → STL Flight Number: 1512 Class: N

Depart ✈ 11/01/2018 4:35 PM

STL → LAX Flight Number: 1352 Class: N

Description	Amount
Ticket	
US	\$
AY	\$
XT	\$
Subtotal:	\$
Tax:	\$
Total:	\$

Sign up for e-receipts

- Personnel must opt in. (Faculty will need to log in and agree to the terms.)

The screenshot shows the CardQuest dashboard. At the top left is the CardQuest logo. To its right is a navigation bar with six items: '+ Start a Report', '+ Enter Reservation', '+ Upload Receipts', '00 View Trips', '00 Available Expenses', and '01 Open Reports'. Below this is a 'TRIP SEARCH' section with a 'Rule Class' dropdown menu and a row of icons for different travel modes (airplane, car, train, etc.). To the right is an 'ALERTS' section with a message: 'You haven't signed up to receive e-receipts. Sign up here'. Below that is a 'COMPANY NOTES' section.

- Click profile settings. Under other settings, select E- Receipt Activation. Then the user agreement will appear, follow instructions and complete.

Use the Concur mobile app

- Manage trips.
- Book taxis, hotel, rail, and rental cars.
- Take photos of receipts on the go.
- Expenselt – Analyzes receipts and automatically creates a line item.